Vendor Aid | Procurement

This detailed vendor manual provides comprehensive, step-by-step instructions for vendors on how to submit change orders, quotes, and invoices through the DEMES Vendor Portal, ensuring accurate and efficient transactions with the Florida Department of Emergency Management.

Updated July 8, 2024
# Table of Contents

Procurement Overview .......................................................................................................................... 3  
1. Submitting a Change Order ............................................................................................................. 3  
   Overview ........................................................................................................................................... 3  
   Login ............................................................................................................................................... 3  
   Detailed Steps ................................................................................................................................. 3  
   Notes ............................................................................................................................................ 4  
2. Submitting a Quote .......................................................................................................................... 4  
   Overview ........................................................................................................................................ 5  
   Detailed Steps ............................................................................................................................... 5  
   Notes ........................................................................................................................................... 7  
3. Submitting an Invoice ...................................................................................................................... 7  
   Overview ........................................................................................................................................ 7  
   Detailed Steps ............................................................................................................................... 7  
   Notes ........................................................................................................................................... 9  
4. General Troubleshooting Tips ......................................................................................................... 9  
5. Support ......................................................................................................................................... 9  
6. Feedback ....................................................................................................................................... 9
Procurement Overview

This manual is crafted to assist vendors in navigating the DEMES Vendor Portal effectively. Through the example of Jane, a vendor operating a supply company, we explore the intricate processes of submitting change orders, quotes, and invoices. This manual not only explains the how of these processes but delves into the why they are necessary and the what each step entails, ensuring vendors are well-informed and able to manage their transactions with the Florida Department of Emergency Management (FDEM) efficiently.

1. Submitting a Change Order

Overview

Change Orders in DEMES are critical for adjusting contract terms in response to unforeseen changes or new requirements. This flexibility helps maintain fairness and efficiency in vendor-FDEM relationships.

Login

- Access the Vendor Portal

Detailed Steps

Example Context: Jane needs to adjust the quantity of emergency water bottles due to a sudden increase in demand after a hurricane.

Step 1: Access the RFQ Change Orders Tab

<table>
<thead>
<tr>
<th>VENDOR CONTACTS</th>
<th>RFQS</th>
<th>RFQ CHANGE ORDERS</th>
<th>SUBMITTED QUOTES</th>
<th>PURCHASES</th>
</tr>
</thead>
</table>
- **What:** Navigate to the RFQ Change Orders tab to find your active contracts.
- **Why:** This tab houses all contracts that may need adjustments, ensuring you can quickly access and modify relevant agreements.
- **How:** Click on the tab in the header bar to view a list of all RFQs eligible for change.

Step 2: Select RFQ

<table>
<thead>
<tr>
<th>RFQ Name</th>
<th>Mission</th>
<th>Created Date</th>
<th>Quote Selection Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 PO-011409 Change Order</td>
<td>07235</td>
<td>05/14/2024, 05:00 PM</td>
<td></td>
</tr>
<tr>
<td>2 PO-011441 Change Order</td>
<td>00007</td>
<td>03/29/2024, 03:39 PM</td>
<td></td>
</tr>
<tr>
<td>3 PO-011440 Change Order</td>
<td>00007</td>
<td>01/19/2024, 03:38 PM</td>
<td></td>
</tr>
<tr>
<td>4 PO-011440 Change Order</td>
<td>00007</td>
<td>01/19/2024, 03:35 PM</td>
<td></td>
</tr>
<tr>
<td>5 PO-011438 Change Order</td>
<td>00007</td>
<td>01/19/2024, 12:36 PM</td>
<td></td>
</tr>
<tr>
<td>6 PO-011420 Change Order</td>
<td>Need batteries</td>
<td>01/09/2024, 02:28 PM</td>
<td></td>
</tr>
<tr>
<td>7 PO-011436 Change Order</td>
<td>00009</td>
<td>01/06/2024, 04:30 PM</td>
<td></td>
</tr>
<tr>
<td>8 PO-011436 Change Order</td>
<td>00009</td>
<td>01/06/2024, 04:17 PM</td>
<td></td>
</tr>
<tr>
<td>9 PO-011416 Change Order</td>
<td>Generator 9/14</td>
<td>12/06/2023, 09:23 PM</td>
<td></td>
</tr>
</tbody>
</table>

- **What:** Choose the specific RFQ Name under which you supplied goods or services.
- **Why:** Selecting the correct RFQ ensures that any modifications are accurately linked to the right
contract.

- **How:** Click on the RFQ Name to open the change order submission form.

**Step 3: Create Change Order Request**

- **What:** Use the form to specify the required changes, such as an increase in quantities.
- **Why:** Detailed and precise change requests help streamline approval by providing clear information to the procurement team.
- **How:** Fill in the form fields with the new quantities and provide a brief rationale if necessary.

*Note: If there is an active Change Order Quote on the RFQ, a reminder message will appear. Click **Next** to proceed.*

**Step 4: Submit Change Order**

Select the Quote Line Item that needs to be adjusted or click **New** to add a new line item.

- **What:** Review your entries and submit the completed change order request.
- **Why:** Submitting a properly reviewed change order minimizes the risk of errors and speeds up the processing time.
- **How:** Click the **Submit** button after ensuring all information is correct.

**Notes**

- The availability and type of fields in the change order form depend on the initial contract terms.
- Details you enter determine how the system routes your request to the appropriate FDEM procurement representative.

**2. Submitting a Quote**
Overview

Submitting a quote allows vendors to propose their goods or services in response to open RFQs issued by FDEM, which is crucial for maintaining competitive and transparent procurement processes.

Detailed Steps

Example Context: Jane decides to submit a quote for providing first aid kits.

Step 1: Navigate to RFQs

- **What:** Access the RFQ section to view all open requests for quotations.
- **Why:** This allows vendors like Jane to find opportunities that match their product offerings.
- **How:** Click on the RFQs tab and browse through the list of open RFQs.

Step 2: Select an RFQ

- **What:** Identify and select the RFQ relevant to your business.
- **Why:** Choosing the right RFQ increases the likelihood of your quote being accepted.
- **How:** Click on the specific RFQ that aligns with your products or services.

Step 3: Create Quote

- **What:** Begin entering details of your proposal in the quote form.
- **Why:** A detailed and accurately filled quote form is essential for the procurement team to assess your offer.
- **How:** Fill out the quote form with product details, quantities, and pricing.

Step 4: Enter Details

Enter details requested to initiate the quote process. Click Next.
Step 5: Add Quote Details

- **What:** Add detailed descriptions and pricing information for each item you're quoting.
- **Why:** Detailed entries help the procurement team understand your offer fully, aiding their decision-making process.
- **How:** Use the Add Line Item button to enter details for each product.

Step 6: Submit Quote

- **What:** Review and submit your completed quote.
- **Why:** Ensuring all information is accurate before submission reduces the chances of delays or rejections.
- **How:** Click Submit Quote after verifying all details are correct.
Notes

- Ensure all fields are completely filled to avoid delays.
- Pay attention to the validity period specified in the RFQ to ensure your quote is considered.

3. Submitting an Invoice

Overview

Invoices formalize the request for payment for goods delivered or services rendered, facilitating timely and accurate financial transactions between vendors and FDEM.

Detailed Steps

Example Context: After successfully delivering first aid kits, Jane prepares to invoice FDEM.

**Step 1: Access Purchases**

- **What:** Locate the Purchases tab to find completed transactions eligible for invoicing.
- **Why:** This ensures that invoices are linked to the correct purchase orders, which is crucial for accurate payment processing.
- **How:** Click on the Purchases tab and select the relevant purchase order.

**Step 2: Select Purchase Order**

- **What:** Choose the specific purchase order for which you need to invoice.
- **Why:** Selecting the correct order ensures that the invoice matches the delivered goods or services, which is essential for smooth payment processes.
- **How:** Click on the purchase order to start the invoicing process.

**Step 3: Create Invoice**

Review the purchase order information. Click the **New Invoice** button to generate a new invoice form.
Step 4: Enter in Details for Invoice

- **What:** Fill in the invoice form with all required details.
- **Why:** Accurately completed invoices help expedite the payment process and reduce the likelihood of disputes.
- **How:** Enter details such as invoice number, date of shipment (goods) or start & end date (service), and units to invoice (column). Scroll to view all columns. Click **Next.** An invoice # will be generated once you click save.

![Invoice Form]

Step 5: Attach Documents

- **What:** Upload necessary supporting documents like delivery receipts.
- **Why:** Providing supporting documents is critical for validating the invoice claims and ensuring prompt payment.
- **How:** Attach files using the upload tool in the invoice form.

![Files Upload]

Step 6: Review and Submit

- **What:** Thoroughly review the invoice and submit it for processing.
- **Why:** A final review ensures all details are accurate, which is essential for quick approval and
payment.

- **How:** Click the Submit Invoice button after reviewing all entries.

**Notes**

- Attach all required documents to support your invoice claims.
- Use the confirmation number to track the invoice processing status.

**4. General Troubleshooting Tips**

- Ensure your browser software is up-to-date to avoid compatibility issues.
- Keep your login credentials secure and readily accessible.
- Regularly check for updates on submissions under their respective sections in the portal.

**5. Support**

For more information, please visit the DEMES [website](#). The site contains support resources, including support contacts, job aids, and FAQs. If personalized support is needed, please use the DEMES Chatbot to obtain knowledge articles or submit a case.

**6. Feedback**

Your input is important to the success of this initiative. Please share your feedback and ideas for enhancements via the DEMES Support process by creating a case.